

**Monthly Report to the Special Trustee  
Office of Trust Litigation Support and Records  
September 2000**

**Following are highlights of records management activities performed by the Office of Trust Litigation Support and Records during September 2000.**

---

**STAFFING**

- ❖ **Management Analyst positions** (research, develop, and implement records management policies, retention schedules; training curricula and aids, etc.)
  - One supervisory position to be classified and advertised
- ❖ **Records Management Specialist positions** (implement records management program, BIA disposition backlog, records cleanup, etc.)
  - Received and reviewed certificate of eligible applicants for three vacant positions—returned without action; action initiated to readvertise and expand area of consideration
  - One supervisory position to be classified and advertised
- ❖ **Archives Technicians positions** (search for refiled or interfiled records; receive, move, and shelve records; inventory records)
  - One position remains vacant—recruitment action initiated
- ❖ **Administrative support positions** (provide clerical and administrative operations support to records staff)
  - One program support assistant position filled
  - Recruitment action initiated for vacant secretarial position
- ❖ **Computer Specialist positions** (analyze, develop, and implement information technology solutions; manage projects to implement electronic records programs for BIA and OST)
  - Recruitment action underway for one position

**TRAINING**

- ❖ **BIA:** Presented Mid-level management records awareness briefings to employees at the following BIA locations:
  - Great Plains Regional Office—25
  - Sisseton Agency—12
  - Cheyenne River Agency—15
  - Standing Rock Agency—24
  - Mescalero Agency—11
  - Northern Pueblos Agency—10
  - Jicarilla Agency—10
- ❖ **BIA:** Presented basic records management training to 27 BIA Office of Indian Education Program employees from the Southwest Region (9 schools)
- ❖ **BIA:** Presented general basic records management briefing to approximately 60 BIA and tribal employees attending a Northwest Region meeting

**Monthly Report to the Special Trustee  
Office of Trust Litigation Support and Records  
September 2000**

**CONTRACTORS**

- ❖ **Iron Mountain Records Management Services** – prepared records for transfer to appropriate storage facilities
  - Ft. Peck Agency—275 boxes
  - Northern Cheyenne Agency—142 boxes
  - Rocky Mountain Regional Office—217 boxes
  - Ft. Peck Agency—275 boxes
  - OTLSR (Hawkins)—480 boxes prepared for local and Federal Records Center storage
- ❖ **G&G Advertising** – continued work on records video and technical leaflets
- ❖ **Bradson Corporation** – Met to review proposed management plan and to develop internal action plan and make staff assignments

**OTHER WORK**

- ❖ **Disposition Backlog at BIA Locations**
  - Worked with BIA locations to approve and transfer records to Federal Records Centers
    - Rocky Mountain Regional Office—217 boxes
    - Crow Agency—33 boxes
    - Northern Cheyenne Agency—142 boxes
    - Ft. Peck Agency—275 boxes
    - Southern Pueblos Agency—12 boxes
  - Met with Iron Mountain to plan the transfer and inventory of approximately 200 boxes stored off-site at the Ft. Berthold Agency
  - Continued cleanup work at the Rocky Mountain Region (see summary under Contractors)
  - Visited the following BIA locations to assess current records storage requirements, inactive records disposition backlogs, and records transfer to appropriate storage facilities
    - Great Plains Regional Office
    - Sisseton Agency
    - Cheyenne River Agency
    - Standing Rock Agency
    - Mescalero Agency
    - Northern Pueblos Agency
    - Jicarilla Agency
  - Ordered 27 space-saver lateral filing systems for 21 BIA locations
- ❖ **Develop and Issue BIA/OST Records Manuals, Training Aids and Provide Technical Assistance**
  - Continued work with contractor on records video and technical leaflets
  - Met with Bureau of Land Management representatives to discuss various training alternatives and tools

**Monthly Report to the Special Trustee  
Office of Trust Litigation Support and Records  
September 2000**

- Online email tutorial
  - Online "Managing Information Responsible"
- Provided ongoing technical assistance to BIA regional and agency office locations
- ❖ **Establish Life Cycle Database (Inventory) for Trust and Other Records**
  - SF-135 data input completed and documents filed
- ❖ **Initiate Action to Replace Historical Records With Working Copies**
  - Identified three possible pilot locations and are working with local BIA staff and NARA representatives to determine their applicability to the project
- ❖ **Review Trust Records Policies and Procedures with MMS, BLM, and DOI and Establish Continuing Dialogue**
  - The Bureau of Land Management (BLM) has reviewed its records policies and procedures
    - Copy of analysis will be provided to IARM
    - Copy of tools used to perform analysis will be provided to IARM
  - BLM will make recommendations for changes where needed
- ❖ **Award New Contract for OST Imaging**
  - Technical, management, and price proposals were evaluated by different teams
- ❖ **Publish Proposed Regulations for Compacted/Contracted Trust Program Records**
  - Proposed requirements associated with leasing/permitting, grazing, probate and funds held in trust were published in the Federal Register July 14, 2000; public comments are due by October 12, 2000
- ❖ **Complete Plan to Comply with Electronic Records Requirement**
  - Reviewed contractor proposals submitted for the development of an electronic records program
  - Worked with the BIA's Office of Information Resources Management to develop procedures for moving data from Albuquerque to the Reston Data Center
- ❖ **Complete Vital Records Plan**
  - Met with Bradson Corporation to review proposed management plan and to develop internal action plan and make staff assignments
- ❖ **Complete Submission of Records Control Schedules to NARA**
  - Completed General Records Schedule analysis; developed

**Monthly Report to the Special Trustee  
Office of Trust Litigation Support and Records  
September 2000**

implementation plan, instructions, and transmittal memorandum; and submitted for review

- Revised action for development of BIA records schedule

❖ **Establish Pilot Project for Electronic Record Keeping**

- Received, reviewed, and forwarded to OTFM the draft design for the FAX data capture project

❖ **Begin Cyclic Evaluations of Records Programs**

- Conducted records program evaluations at the following BIA locations
  - Great Plains Regional Office
  - Sisseton Agency
  - Cheyenne River Agency
  - Standing Rock Agency
  - Mescalero Agency
  - Northern Pueblos Agency
  - Jicarilla Agency